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Control the visibility of your content with Entity Visibility Preview

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Who am I?

Florent Torregrosa

Drupal Tech expert at Smile:

Drupal history:

- Started using Drupal with Drupal 6 in 2011 for student associations
- Started coding on Drupal 7 as an intern in 2013
- Then developer to tech expert over the years

Contributions:

- Individual member of the Drupal Association
- Individual member of the French Drupal Association
- Former secretary of the French Drupal Association
- Maintainer/Co-maintainer on 20+ modules
- Events co-organizer (French Drupalcamps, DDD 2015, local meetups)
- Moderator in the French translation team
- Patches on modules and core

Links:

- Drupal.org: Grimreaper
- Twitter: Florent_Torre

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Summary

1. Why personalized content?
   a. Context
   b. 2 Main axes of changing content
2. Why the Entity Visibility Preview module?
   a. Scheduling content publication
   b. Content segmentation
   c. Preview
3. Entity Visibility Preview's architecture
   a. Architecture
   b. 2 Embedded Plugins
   c. Limitations
   d. Ecosystem
4. Demo - case study

Why personalized content?
In context

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Personalized content

Context:

- Being able to address the right piece of information to the right person
  - Reduce the effort to access to the information
  - Increase engagement
- Allowing marketers and content contributors to preview exactly how the website will behave depending on personalization

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2 Main axes of changing content

SCHEDULED PUBLICATION / DEPUBLICATION

ADAPTING CONTENT BASED ON SEGMENTATION

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2 Main axes of changing content

Scheduled publication / depublication

Be able to schedule when content will be available or not

- Visitors do not have to access irrelevant content
- Contributors can prepare content and schedule publication
  - Useful if you have piece of content displayed depending on contracts

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2 Main axes of changing content

Adapting content based on segmentation

Show different content depending on user's segmentation

- level of experience
- client type
- age
- etc.

Why Entity Visibility Preview? Alternatives discovery (end of 2017)

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Scheduling content publication

Scheduler:

- Only for node
- At this time (end of 2017) no integration with content moderation
- No preview

Schedules Updates:

- Scheduling is not handled per entity (on the entity form)
- No preview

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Content segmentation

Constraints:

- The website is autonomous: no external services dedicated to that.
- Should work for authenticated users.

Taxonomy Access Control:

- No Drupal 8 version
- Only for node

Taxonomy Access Control Lite:

- Only for node

Preview

Workspace:

- Not stable enough at the moment
- Not fined grained
- Too hard to use for the client
- Not a preview tool

Entity Visibility Preview's architecture

Architecture

- **Provide a new field type:**
  - Inspired from Metatag for the storage and field widget
- **Provide a new plugin type:**
  - Handle access control logic
  - Provide and handle form element on the field widget
  - Provide and handle form element on the preview form and a preview message
- **Provide a preview form:**
  - Allow to preview the website depending on conditions.
  - Preview values are stored in session.

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Architecture

2 embedded plugins

Each plugin can be enabled and configured per field instance.

Date range

- Start date only: content will be visible from this date.
- End date only: content will not be visible from this date.
- Start and end dates: content will be visible in this interval only.

Taxonomy

- Choose one or several taxonomy terms (OR between terms).
- Configure:
  - Which vocabularies to reference terms from.
  - Which taxonomy reference fields on the user entity to compare with.
  - Set values for the anonymous users on a dedicated form.

Architecture

Limitations

No distinction between anonymous users. Mainly for authenticated users.

Node Grant API not supported in a generic way, no access control in:

- Views,
- entity queries,
- Search API,
- ...

Views integration: currently impossible to have filters on visibility conditions (for BO views), see #3136518. You can display the visibility conditions using a field formatter.

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Entity Visibility Preview's ecosystem

Entity Visibility Preview Simple Grants (sub-module)

- Provide Node Grant API support for the two embedded plugins (date range and taxonomy)

Demo - case study

Demo - case study

Entity Visibility Preview: link to a global demonstration video on the project page.

Case study: Captain Tortue Pro (extranet)

Client business: “Tupperware” like business model for clothes. Sales representatives selling clothes in private meetings.

Goal: Help Captain Tortue’s salesforce to have tools and guides to be more effective.

Entity Visibility Preview was used to allow content to be accessible depending on the experience and the role of the salespersons and depending on the period of the year, to match new clothes collections for example.

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Friday, December 11, 2020

Mentored Contribution

First Time Contributor Workshop

General Contribution

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What did you think?

Locate this session at the DrupalCon Europe website:

https://events.drupal.org/europe2020/sessions/control-visibility-your-content-entity-visibility-preview